

## Position Description

**JOB TITLE:** Legal Secretary

**DATE:** August 2019

**DEPARTMENT:** Secretarial Department

**FLSA STATUS:** Non-Exempt

**OFFICE:** San Francisco

**JOB STATUS:** Regular, Full-time

**REPORTING RELATIONSHIP:** Reports to the Manager of Secretarial and Word Processing Departments; on a day-to day basis, works under the direction of the attorneys to whom the secretary is assigned.

**BASIC FUNCTION:** Supports the delivery of quality legal services to clients by providing secretarial and administrative assistance to attorneys, performing complex and specialized secretarial and clerical tasks, and working collaboratively and cooperatively with others in a team-oriented environment. This position supports a set of attorneys as a primary assignment. This assignment may change. On occasion the secretary may be asked to provide overflow assistance to others.

**ESSENTIAL FUNCTIONS:** Regular and predictable attendance is an essential function of the job.

**Prepares Documents:** Using the firm's word processing and document management software, types, prepares and processes correspondence and memoranda as well as complex legal documents according to the requirements set by each practice, requires knowledge of legal terminology and procedures and advanced formatting skills. Prepares shell/template documents (including pleadings and discovery) for attorneys. Composes and drafts routine cover letters, emails and documents. Proofreads documents and checks for appropriate formatting, spelling and grammar. Prepares revisions and redlines documents as directed. Coordinates lengthy and complex document preparation with the Word Processing staff as needed.

**Processes Mail:** Reviews, scans, profiles and distributes incoming mail communications. Prepares and processes outgoing mail, arranges for specialized mail or messenger services as required. Ensures that all attachments, exhibits and enclosures are included. Coordinates activities with the mailroom personnel as needed.

**Maintains Calendar:** Maintains and updates the calendars for assigned attorneys, including meetings, appointments, due dates, and client-related activities. Coordinates specific client dates with the Calendar Department as needed.

**Maintains Files:** Responsible for creating and maintaining client files, binders and indexes electronically and in hardcopy according to firm policies and procedures. Performs electronic

profiling and hardcopy filing and retrieves files as needed. Works with the Secretarial Assistants and the Records Department to accomplish this task. Marks case or matter related documents as needed with filing instructions to ensure proper filing.

**Coordinates Financial Functions:** Enters or reviews daily timesheets for assigned attorneys in a timely manner. Prepares expense reimbursement and disbursement requests. Coordinates client billing matters with the billing staff in the Accounting Department. Electronically prepares client invoice from pre-bill: performs text edits, makes adjustments or write-offs of fees and costs, transfers time and costs, confirms rate/discount, and updates address information.

**Provides Administrative Support:** Prepares and processes new matter forms and engagement letters. Receives and screens phone calls and takes messages as required. Receives and directs clients and visitors. Coordinates travel arrangements, prepares itineraries, and prepares travel expense reports. Schedules meetings and arranges for conference rooms and meals with catering staff. Maintains and updates contact names and addresses in the firm's contact database. Communicates effectively with clients and with others in the firm. Is proactive in anticipating the business needs of the assigned attorneys; plans ahead and meets deadlines.

**Cooperates with Team Efforts:** Demonstrates effective teamwork and provides assistance to other secretaries as time permits. Works cooperatively with other departments and individuals in the firm.

**Other:** Performs other related secretarial and administrative duties as assigned. Occasional overtime work may be required.

**QUALIFICATIONS AND REQUIREMENTS:** To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the education, experience, skills, knowledge and abilities required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential duties.

- **Education:** High school diploma or GED required; some college or business school desirable.
- **Experience:** At least three years experience as a Legal Secretary or Executive Secretary.

**Knowledge, Skills and Abilities:**

- Demonstrated knowledge of legal terminology, legal documents, and legal processes in the area(s) in which the Legal Secretary is employed. Strong computer proficiency in the use of the MS Office Suite of software (Word, Outlook, and Excel), pdfs, document management, time entry and other database software.
- Accurate typing at a net speed of at least 65 words per minute.
- Excellent communication skills, both written and verbal; demonstrated understanding of correct grammar, spelling and punctuation.
- Ability to work effectively within a team environment and to work proactively.

- Strong time management skills and the ability to work under pressure in a fast-paced environment; ability to coordinate multiple tasks concurrently and to meet deadlines.
- Strong organizational skills, interpersonal skills, and attention to detail.

**Level:** Works under moderate supervision; exercises moderate level of discretion and independent judgment.

**Physical Demands:** The physical demands described here are representative of the requirements that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. While performing the duties of this job, the employee is regularly required to handle objects, tools or controls; use a computer keyboard and mouse; reach objects above, below and at desk level and at floor level; and talk and listen. The employee is frequently required to move about the office and sit, as well as to lift and transport objects such as books and files weighing up to 15 pounds. Specific vision abilities required by this position include close vision and the ability to adjust focus.

**Work Environment:** The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job, including moderate noise level, an indoor temperate environment, and light levels that are bright and conducive to minimal eye strain, typical for an office environment.

**SCOPE OF JOB DESCRIPTION AND MODIFICATIONS:** This job description intends to describe the general nature of the job and does not represent that all such duties will be performed by all individuals who hold the job. This job description does not limit the tasks that an employee may reasonably be requested to perform and in no way alters the firm's at-will employment policy. Substantive changes to this job description may be necessary to meet the changing business needs of the firm. Any substantive revisions to this job description require the approval of the Director of Human Resources.

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